

COVER SHEET FOR AMENDMENT OF POST-TRAVEL SUBMISSION

Date/Time Stamp
RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS
2018 AUG 30 PM 3:01

Instructions: Use this form as a cover sheet for any paperwork you may need to submit to the Office of Public Records in order to make your Privately Sponsored Post-Travel Submission complete in accordance with Rule 35. **Only complete this form if you need to submit an amendment to a post-travel filing you have already submitted.**

SUBMIT DIRECTLY TO THE OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING

Name of Traveler: Candace Vahlson
Employing Office/Committee: Senator Bonnet
Travel Expenses Paid by (List all sources): American Council for Energy
Travel Date(s): 8/22/2018 Effort Energy (ACEE)
Description/Title of Attached Forms: Amendment to travel itinerary

Purpose of Amendment (describe the reason for amending original submission): I did not
realize the committee needed detailed information
on the travel itinerary

8/30/2018

(Date)

(Signature of Traveler)

Addendum to private sponsored travel for Candace Vahlsing

There were modifications in the travel itinerary. The train to NY Penn Station got in later than anticipated and I took a local train from NY Penn Station instead of NY Grand Central Station to Yonkers and a taxi, since the local train was running late, from Yonkers to the conference. ACEEE reimbursed me in full for these costs which are included in the \$325.01 on the travel authorization form.

Date	City,State	Currency	US Dollar	Note: Description of Expense Claim
	(or Country)	Amount	Amount	
5/22/2018	Washington, D.C.	\$245.00	\$245.00	Round trip WAS to NYP Amtrak
5/22/2018	New York	\$17.00	\$17	Amtrak NYP to Yonkers
5/22/2018	New York	\$42.00	\$42.00	Taxi from Yonkers to Conference, train was delayed
5/22/2018	New York	\$9.25	\$9.25	Commuter Train from Conference to Grand Central
5/22/2018	New York	\$11.76	\$11.76	Taxi Grand Central to NYP

00
00
7-1
10
00
00
00
00
00
00
00
00
00



American Council for an Energy-Efficient Economy

529 14th Street, N. W., Suite 600 • Washington, D.C. 20045 • 202.507.4000 • 202.429.2248 • www.aceee.org

Detailed itinerary for May 22, 2018. All times are in EST.

- 3:10 am – 6:41 am: train from Washington, DC Union Station to Pennsylvania Station in New York City, NY via NE Regional 190.
- 6:41 – 7:19 am: Taxi from NY Penn Station to NY Grand Central Station.
- 7:19 – 7:59: Grand Central Station to Tarrytown, NY Metro North station via Metro North.
- 7:59 – 8:15am: Taxi from Tarrytown Metro North station to DoubleTree Tarrytown, the location of the conference, 1.5 miles total.
- 8:15 – 8:30am: Breakfast at conference.
- **Conference detailed agenda:**
 - Opening Session:
 - 8:30 – 8:35am: Brian Stickles of ACEEE convenes the conference and introduces Anmol Vanamali, Financing Strategies Director at VEIC.
 - 8:35 – 8:45am: Anmol Vanamali gives Co-Chair address on the state of Energy Efficiency Financing and VEIC's role in catalyzing investments.
 - 8:45 – 9:15am: Erin Robert, Executive Director of Sustainable Finance, JP Morgan Chase & Company gives Keynote address about JP Morgan's involvement and history of clean energy investing.
 - 9:15 – 10:30am: Candace to moderate panel on consumer protections in Residential Property Assessed Clean Energy with Cisco Devries, CEO of Renew Financial and John Rao, Attorney at the National Consumer Law Center.
 - 10:30 – 11:00am: Break in conference programming
 - 11:00am – 12:30pm: Breakout sessions, Candace attending one of the following, but not presenting.
 - 2A: Serving Rural Communities Moderator: Mary Shoemaker, American Council for an Energy-Efficient Economy Advancing a Clean Energy Economy in Central Appalachia Presenter: Hannah Vargason, Natural Capital Investment Fund On-Bill in Rural Communities Presenter: John-Michael Cross, Environmental and Energy Study Institute Manufactured Housing: A Nexus of Clean Energy and Affordable Housing Finance Presenters: Mark Wyman, Energy Trust of Oregon Desiree Sideroff, Craft3
 - 2B: Green Bank Evolution Moderator: Jeff Schub, Coalition for Green Capital From Failed to Troubled and Beyond Presenter: Gwen Yamamoto Lau, Hawaii Green Infrastructure Authority Green Banks: Working at All Levels Presenter: Tom Deyo, Montgomery County Green Bank Colorado's Portfolio Approach to Clean Energy Financing Presenter: Paul Scharfenberger, Colorado Energy Office
 - 2C: Multifamily Lending — Panel Discussion on the role of energy efficiency in multifamily lending. Moderator: Amy Brusiloff, Bank of America Panelists: Sadie McKeown, Community Preservation Corporation Katie Elmore, Community Investment Corporation Esther Toporovsky, Enterprise Community Partners Chrissa Pagitsas, Fannie Mae
- 12:30 – 12:43pm: Taxi from conference to Tarrytown Metro North train station.
- 12:43 – 1:28pm: Metro North train ride from Tarrytown Metro North train station to Grand Central Terminal in New York City, NY.

- 1:28 – 2:02 pm: Tax from NY Grand Central Station to NY Penn Station.
- 2:02 – 5:22pm: Amtrak NE Regional Train 93 from New York Penn Station in New York City, NY to Union Station in Washington, DC.

12150000005171

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): The American Council for an Energy-Efficient Economy (ACEEE)
2. Description of the trip: To moderate a presentation at the annual Energy Efficiency Finance Forum on the role of consumer protection in Property Assessed Clean Energy (PACE) financing.
3. Dates of travel: May 22, 2018
4. Place of travel: Tarrytown, New York
5. Name and title of Senate invitees: Candace Vahlsing [See addendum item #1 for full title]
6. I *certify* that the trip fits one of the following categories:
 - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
 - OR -
 - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.

- AND -

☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
 - AND -
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

- OR -

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

- OR -

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

ACEEE is a non-profit research institution that seeks to advance energy efficiency. We put together an annual conference called the Energy Efficiency Finance Forum, which seeks to share best practices for energy efficiency finance among its attendees. [see addendum for further details].

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

ACEEE's mission is to advance energy efficiency policies, programs, technologies, investments, and behaviors. This trip will include a presentation on best practices in investments, part of ACEEE's mission statement.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

ACEEE has no history of sponsoring congressional trips.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

ACEEE is a non-profit research organization that writes white papers and research reports. It also hosts conferences to share best practices in the field of energy efficiency.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	\$289.75 (round trip train fare and taxi rides. See addendum)	None	\$34.44 (meals provided to all conference attendees as part of registration fee)	\$525 (registration for speaker)
<input type="checkbox"/> Actual Amounts				

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip involves an event that is arranged or organized without regard to congressional participation.

18. Reason for selecting the location of the event or trip

A lot of our audience are from the east coast, New York specifically. This particular hotel could accommodate the number of people who are attending the conference, the room setup is ideal for our sessions.

19. Name and location of hotel or other lodging facility:

Not applicable.

20. Reason(s) for selecting hotel or other lodging facility:

Not applicable

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The meal expenses provided to the trip participant are less than the per diem rate for official Federal Government travel to Tarrytown, NY. There are no lodging expenses.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Travel will be coach class train. There will also be taxi rides between Penn Station and Grand Central as well as taxi rides from Tarrytown, NY and the conference location (see addendum item 2 for details).

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

There will be no entertainment reimbursed.

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: _____

Name and Title: Neal Elliott, Senior Director for Research

Name of Organization: The American Council for an Energy-Efficient Economy

Address: 529 14th St NW, Washington DC 20045

Telephone Number: (202) 507-4000

Fax Number: (202) 429-2248

E-mail Address: mellott@aceee.org



1. In response to question 5: Candace Vahsling's full name and title are: Candace Vahlsing, Senior Advisor for Energy, Climate, and Environment for Senator Michael Bennet.
2. In addition to question 12: ACEEE is the sole sponsor of the Forum and this trip, and has organized all aspects of this trip.
3. In response to question 16: Candace will be taking the coach class train (full itinerary below), but will transfer from New York Penn Station to Grand Central Station in New York City. Candace will take a taxi between those stations on both lengths of the trip. Candace will also take a taxi from the Tarrytown Metro North Station to the conference location and back. This, in total, represents 4 different train tickets and 4 different taxi rides, the 8 items add up to \$289.75. The itemized rough expenses for this trip are:
 - a. Coach class train from DC Union Station in Washington, DC to NY Penn Station in New York, NY via Amtrak: \$93 (per Amtrak website as of 5/15)
 - b. Taxi from NY Penn Station in New York, NY to Grand Central Terminal in New York, NY: \$15 (estimated)
 - c. Coach class train from Grand Central Terminal in New York, NY to Tarrytown NY via Metro North: \$14 (one-way peak fare)
 - d. Taxi from Tarrytown Metro North Station to conference location in Tarrytown, NY: \$10 (estimated, 1.5 miles of travel)
 - e. Taxi from conference location in Tarrytown, NY to Tarrytown Metro North Station: \$10 (estimated, 1.5 miles of travel)
 - f. Coach class train from Tarrytown, NY to Grand Central Terminal in New York, NY via Metro North: \$10.75 (one-way off-peak fare)
 - g. Taxi from Grand Central Station in New York, NY to New York Penn Station in New York, NY: \$15 (estimated)
 - h. Coach class train from NY Penn Station in New York, NY to DC Union Station in Washington, DC via Amtrak: \$122 (per Amtrak website as of 5/15)

(U)
To
NY
LO
(C)
(C)
(C)
(C)
(C)
(C)
(C)
(C)